

OFFICE PROCEDURES

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NOTE: Please allow at least three weeks to process paperwork. If less than three weeks we can not guarantee approval.

1. ACCESS REQUEST FORM - BADGE

1. Supervisor completes the security access form.
2. Employee and supervisor sign the form
3. Fax the form to Butch Luers AND send the original to Butch
4. Butch will take the form to Brenda Bryant's office for signature
5. Butch will notify the supervisor when the employee may come for their picture
6. Removal of Access-Contact Butch for instructions.

2. CLAIM FOR PAYMENT

NOTE: A Claim for Payment is **ONLY** used for **SMALL** justifiable incidental purchases which are paid out of pocket by employee and reimbursed by the state. If you have any questions what constitutes small and justifiable call Debbie at 538-7082.

The Claim for Payment is NOT used for reimbursement of TRAVEL

PROCESS:

1. Fill out the Claim for Payment form
2. Attach original receipts
3. Requestor signs the form
4. If the requestor is:
 - a) Manager: Fill the form out, sign, attach all receipts and send the form to Jaime for Robert's signature; Jaime will send the form to Debbie.
 - b) Supervisor: Fill out the form, sign and attach all receipts. Have the manager sign the form send the form to Debbie.
 - c) Staff: Fill out the form, sign and attach all receipts. Have the supervisor and manager sign the form. Send the paperwork to Debbie.
5. Debbie will take the paperwork to Amber for processing
6. Call Debbie at 538-7082 for update on the payment

3. CONFERENCE REQUEST – OUT-OF-STATE

NOTE: Only one staff member can attend the same conference, unless they get special approval.

AIRLINE TRAVEL

1. Supervisors obtain an e-mail approval from your manager. The e-mail needs the following information.
 - a) name of the conference
 - b) date, time and address of the conference location
 - c) name and telephone number of the hotel
 - d) name and telephone number of the person attending
 - e) justification
 - d) how org money will be charged to
 - d) if approved the manager will forward e-mail to Jaime
2. Requestor fax Jaime a copy of the brochure and pamphlet information of the conference, and the out of state request forms to 538-6952.
3. Jaime will type a memo to Brenda Bryant for approval with conference attachments and out of state request forms.
4. Upon approval Gayle will take to Colene Tucker to make the travel arrangements.
5. After the trip, take in all receipts from the hotel, taxi, boarding passes and parking to Amber who will fill out the reimbursement form.
6. Amber will get the reimbursement form signed.

USE OF PRIVATE VEHICLE

1. It is the Bureau's preference that a State vehicle be used; however, if a Private vehicle is necessary, do the following:
 - a) The supervisor obtains e-mail approval manager
 - b) The following information is needed in the e-mail: date, time, destination, name of the conference, the requestors name and phone number
 - c) If approved, the manager will forward the e-mail to Jaime
 - d) Jaime will type a memo for approval to Brenda Bryant
 - e) Jaime will call Amber Poplin to find out what reimbursement cost will be and notify supervisor.
 - f) Mileage will be reimbursed according to whichever costs less, the air flight or mileage.
 - g) Upon approval Jaime will take the memo to Amber
 - e) Amber will take the memo for Finance for approval
 - i) Upon approval Amber will notify the requestor

4. CONFLICT OF INTEREST FORM

1. Fill out the form and have the supervisor and manager sign the form
2. Send to Jaime
3. Jaime will send the form to HCF directors office for signature
4. Jaime will keep a copy of the form and send the original to H.R.

5. EDUCATION ASSISTANCE PROGRAM

1. Requestor will fill out form
2. Send the form to Jaime for Robert's signature
3. Jaime will take to Gayle Coombs for processing

6. EXERCISE FORM

1. Fill out the form
2. The supervisor and manager needs to sign the form and send or fax to Jaime
3. Jaime will send the form to HCF directors office for signature
4. Jaime will keep a copy of the form and send the original to H.R.

7. EXHIBITS/BOOTHS

1. Employee will gather information and application for the booth
2. Get approval memo from supervisor
3. Send into Jaime for HCF director's signature
4. Jaime will give to Debbie for the Purchase Order

8. FLEX TIME FORM

1. Fill out the form and have the supervisor and manager sign the form
2. Send to Jaime for Robert's signature.

9. IN-STATE LODGING, MEALS AND AIR PLANE REQUEST

1. Supervisor e-mail manager to obtain approval
2. If approved the manager will forward the e-mail to Jaime
3. Same day travel:
 - a) Motor Pool vehicle: Supervisors obtain e-mail approval from the manager, after approval call Motor Pool at 538-6109 for reservations.

b) Private vehicle:

- Supervisors obtain e-mail approval from manager. Include the requestors name and telephone number.
- If approved the manager will forward the e-mail to Jaime
- Jaime will type a memo to Brenda Bryant to approval
- If approved Jaime will take the memo to Amber
- Amber will take the memo to Finance and notify requestor
- Upon return from the trip, fill out an In-State Travel Reimbursement Form for per diem and mileage reimbursement, with obtained signatures.
- Send in the In-State Travel Reimbursement form to Amber Poplin. Amber will take the forms to Finance for payment

c) Air flight arrangements

- Obtain an e-mail approval from your manager, include the requestors name and phone number
- If approved the manager will forward the e-mail to Jaime
- Jaime will type a memo to Brenda Bryant for approval
- When approved Jaime will take the memo to Amber
- Amber will notify the requestor when request is approved and further arrangements made for flights

2. Over night hotel request

- a) Supervisors obtain e-mail approval from manager. When approved the information will be given to Amber who will make the hotel reservations. Hotel reservations must fall within State guideline costs.
- b) Basic meal allowance for a 24 hour period of travel is as follows:
- Breakfast \$6.00, lunch \$9.00, dinner \$15.00 a total of \$30.00. The meal reimbursement is determined by the time of day the traveler leaves his home base and the time of day returned to home base.
 - Upon return fill out an In-State travel reimbursement form
 - Send form to Amber Poplin
 - Amber will take the forms to Finance for payment
 - If there are questions call Amber at 538-6544

10 ITS/ACF2 – ACCESS REUQUEST FORM

- 1) Supervisor fill out the form
- 2) Employee and supervisor sign the form
- 3) Mail the original form to Butch
- 4) Butch will notify supervisor.

11 NATIONAL ORGANIZATIONS

NOTE: By policy staff are allowed to belong to **ONE** national organization.

1. Requestor fill out and sign the National Organization form
2. Forward the form to your supervisor for signature
3. Supervisor forward the form to the Manager for signature
4. Forward **original form** to Jaime for Robert's signature
5. Jaime will give the form to Debbie for the Purchase Order
6. Debbie will give the form to Amber for PO number
7. Amber will give the forms to Gayle for Brenda's signature and send to finance.

12 OUT OF STATE TRAVEL

1. Requestor sign the out of state travel form
2. Supervisor sign the form
3. Robert sign the form
4. Jaime will type memo and send it for Brenda Bryant to sign
5. If approved Gayle will send up to finance to Colene.

13 INCENTIVE AWARDS

Only 40% of the employees can receive a service award

14 REIMBURSEMENT REQUEST FOR MEALS (IN-STATE TRAVEL)

1. Requestor fill out and sign the In State Travel reimbursement form
 - a) Staff give the form to your supervisor for signature
 - b) Send the form to Amber Poplin

Supervisors fill in and sign the form

- a) Give the form to your manager for signature
- b) Send the form to Amber Poplin

- a) Managers fill out and sign the form
- b) Give the form to Jaime for Robert's signature
- c) Jaime will take the form to Amber

15 REIMBURSEMENT REQUEST (HOTEL)

Take the original hotel receipts to Amber Poplin to process

16 REIMBURSEMENT REQUEST (OUT OF STATE TRAVEL)

1. After the trip, fill out Reimbursement Form for Out of State Travel.
2. Send all ORIGINALS Motel, Taxi, parking and boarding passes to Amber
3. Amber will take the form to Finance

17. RETIREMENT SOCIAL

1. As soon as the supervisor is notified of retirement, notify the manager
2. Jaime will process the paperwork as quickly as possible, It make take up to three weeks for approval.
3. E-mail the manager with the following information for approval
 - a) Agenda, date, and time of the location
 - b) If a letter and certificate from the Governor is requested, include a short paragraph describing the retirees outstanding qualities
 - c) Refreshments – You are allowed \$3.00 per person, The following information is needed for the purchase order
 - Low org the monies are to be taken out of
 - Name, address, telephone number of the store the food will be purchased from (Check with Debbie to find out if the place of purchase accepts purchase orders, if not given at lease three weeks
 - Itemize purchases, quantity and total cost
 - Name and telephone number of the contact person
4. If approved the manager will e-mail Jaime
5. The retiree may be awarded a \$200.00 check; inform manager as soon as possible so that the check may be ready for the retirement day. If enough time is not allowed the check will be send in the mail to the retiree. A memo will need to be done to request the \$200.00.
6. Jaime will prepare the memo to Shari Watkins through Brenda Bryant for signature.
7. Jaime will contact H.R. with a request to provide the following:
 - a) A letter from the governor
 - b) A certificate from the governor
 - c) A cash award of \$200.00
 - d) H.R. will give the above information to Jaime and Jaime will make sure they arrive to the manager.

18 RETREAT & FOOD PURCHASE ORDER (allow weeks for processing)

NOTE: Per Policy each Team is authorized to have **ONE** retreat per fiscal year,

clinics due to their specialty may have 2 half day retreats. To be considered a retreat the agenda is to include team building.

NOTE: If you hold a retreat from 8 am to 12 pm you are allowed to have a break purchased by the State

If you hold a retreat from 12 pm to 4 pm you are allowed to have a break purchased by the State

1. Supervisors e-mail the request to managers for approval
2. The e-mail request must contain the following information:
 - Date, time and address of where retreat is held
 - Agenda
 - A list and number of the staff attending the retreat
 - A recommended guidelines for meals provided at state sponsored retreats (gratuity may be reimbursed in addition to these amounts) Breakfast \$6.00 per person. A.M. break \$3.00 per person, lunch \$9.00 per person, P.M. break \$3.00 per person, dinner \$15.00 per person
 - Include total cost for breaks and lunch
 - If food is catered: a copy of the menu, which item was chosen for lunch and/or breaks and the total cost
 - If food items will be purchased from a store, include the name, address and phone number of the store and a list and cost of items being purchased with the total cost
 - Low org covering costs
 - Indicate the name and telephone number of the person to be contacted.
3. If the manager approves the request the e-mail will be forwarded to Debbie.
4. Debbie will type a memo to Shari Watkins through Brenda Bryant for approval
5. Debbie will write up a PO
6. Debbie will take the memo to Jaime for Robert's signature
7. Jaime will take the memo and attachment to Gayle
8. Directors office will send the memo up to finance

19 STATE AERONAUTICS

1. Requestor will e-mail their request for approval to their supervisor
2. The supervisor will e-mail the request to the manager for approval
3. The manager will e-mail their approval to Jaime
4. Jaime will type a memo to Brenda Bryant from Robert

5. The memo will then be taken to Amber to make the arrangements

20 TRAINING - CONFERENCE (IN STATE)

1. Fill out a training/conference form
2. Supervisor and manager sign the form
3. Send the original form with the conference/training information attached to Debbie
4. Debbie will do the PO
5. Debbie will give forms to Jaime to obtain Robert's signature
6. Debbie will get Brenda's signature
7. Debbie will give to Amber

21. TELECOMMUTING FORM

1. Supervisor initiates the paperwork
2. The paperwork is sent to the manager for approval and initials
3. The manager sends forms to Jaime for Robert's signature
4. Jaime will obtain Brenda Bryant's signature
5. Jaime will give a copy to the supervisor and the original send to H.R.

22. TELEPHONE ORDERS AND DATE WORK ORDERS FORM

1. Contact Butch Luers. Butch will forward the supervisor the appropriate form and give further instruction

23 VOLUNTEER PLACEMENT

1. Give the original form with the original signature to Jaime
2. Jaime will give to Michael Deily for signature
3. Gayle Coombs will send to personnel